

RETIREMENT OFFICER

DEFINITION: Under general supervision, performs work of moderate difficulty in administering the Nation's retirement plans and benefits; applies specific retirement policies in resolving a variety of conventional retirement issues and problems; performs related work as assigned.

ESSENTIAL FUNCTIONS: This list is ILLUSTRATIVE ONLY and is not a comprehensive listing of all functions and tasks performed by incumbents of this class.

TASKS:

Administers employee retirement plan options; provides individual employee counseling, explaining details of retirement options, eligibility requirements and benefits of enrolling in the Nations 401K plan; addresses moderate complex retirement issues, such as unnamed beneficiaries, divorces, marriages, distribution of property, early withdrawal, etc.; interprets and explains retirement laws and regulations; deals extensively with employees and managers outside the immediate office.

Reviews pension calculations; researches historical records, salary, and employment history to ensure accuracy; explains employee retirement options and paperwork including direct deposit, tax withholding, and election; collects employee data for submittal for actuarial valuation; updates active, vested termination and retiree reports.

Processes enrollments, changes, loans, terminations, and distribution of 401 (k) accounts; monitors system to ensure accurate information is processed for participants; reconciles benefit payment amounts; advise and communicate to participants any change or updates to the 401 (k) or other retirement options; keeps updated on rules and regulations governing retirement plans.

Prepares recurring and ad hoc retirement plan statistical and other reports; provides technical assistance to staff regarding retirement plan policies and procedures; communicates with tribal departments and outside agencies regarding retirement plans; attends meetings.

KNOWLEDGE, SKILLS AND OTHER CHARACTERISTICS:

Knowledge of federal, state, and tribal laws and regulations governing retirement plans.

Knowledge of tribal retirement benefit plan options.

Knowledge of Navajo Nation's personnel policies and procedures.

Knowledge of statistical methods and techniques.

Skill in communicating orally and in writing.

Skill in responding to complex retirement issues.

Skill in presenting retirement information to a variety of individuals and groups.

Skill in researching, compiling, and preparing statistical reports.

Skill in establishing and maintaining effective working relationships.

PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT: Work involves a minimum of physical effort in an office setting.

MINIMUM QUALIFICATIONS: An Associate's degree in Business or related field; and three (3) years progressively responsible benefits or retirement plan experience.

THE NAVAJO NATION

Class Code: 1415
Human Resources Series
Human Resources Services Group
Overtime Code: Non-Exempt
Pay Grade: 60

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Depending upon the needs of the Nation, some incumbents of the class may be required to demonstrate fluency in both the Navajo and English languages as a condition of employment.